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Wealthtech Weekly

November 14, 2024

By Rob Burgess
Reporter

Last Wednesday was my final "Retirement" newsletter. Today is my first "Wealthtech Weekly" as I begin my new beat covering investment strategies and technology.

What topics are you interested in reading about?

What stories or trends are you noticing that you don't feel are being adequately reported on?

What gaps do you see in your technology stack that aren't being addressed?

What sorts of investment products are you interested in hearing more about?

Please email me at robert.burgess@arizent.com with your answers and any tips.

As always, thank you for reading! Talk to you next Thursday!

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TOP STORIES

INVESTMENT STRATEGIES

What Trump's re-election means for portfolios, Fed rate cuts

After yet another rate decrease, Federal Reserve Chair Jerome Powell remained defiant after Election Day, telling reporters he would not resign.

- **Portfolio allocations to personal freedoms: Post-election client concerns**
  Republican President-elect Donald Trump is headed back to the White House, and his party will retake the U.S. Senate, which likely means deregulation and lower taxes.

- **Envestnet partners with Axos Clearing on managed account integration**
  Axos Clearing partners with Envestnet to integrate Envestnet's managed account features into the Axos Clearing portal, streamlining portfolio management.
- **Easing the financial frustration of the 'sandwich' Gen Xers**
  A recent FINRA Investor Education Foundation report, "How Gen X Compares Financially to Other Generations: Doing Alright but Feeling Bad," found few born between 1965 and 1980 reported positive feelings about their financial situation.
- **Women find financial advisors via trusted networks, study shows**
  Women clients tend to seek advisor referrals from other women and prioritize long-term planning, an Edward Jones study indicates.

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